RECORDS MANAGEMENT QUESTIONNAIRE

Department Name:_____

Individual Completing Questionnaire:_____

1. How many unique PM USA Records Retention Schedules exist for your department and other areas for which you are responsible?

   _____

2. What percent of the number of Retention Schedules indicated in question 1 have been approved and signed by the department head, legal counsel and Records Management?

   _____

3. What estimated percentage of records in your department and other areas in PM USA for which you are responsible have been classified and labeled according to the procedures outlined in the PM USA Records Management Manual?

   _____

4. What estimated percentage of records in your department and other areas in PM USA for which you are responsible have been inventoried according to the procedures outlined in the PM USA Records Management Manual?

   _____

5. Does your department have a computer system to assist in managing records for your areas of Records Management responsibility?

   [] YES [] NO

   If yes, give the name of the software program being used:

   _____

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6. If the answer to question 5 is YES, indicate whether the following functions are currently being used or indicate the approximate date the function will be implemented.

Check box if currently being used:	List date of future use:
[] Retention Schedule Maintenance	_____
[] Inventory Form Maintenance	_____
[] Records Retention & Disposition	_____
[] Active Records Maintenance	_____
[] Inactive Records Maintenance	_____
[] Creation of Transfer & Disposal Notices	_____
[] Indexing and Retrieval	_____
[] Records Management Reporting	_____
[] Other _____ (specify)	_____

7. If you indicated that "Inventory Form Maintenance" is a current function in question 6, give the estimated percentage of Inventory Forms that have been entered in the system for your areas of PM USA Records Management responsibility.

_____

8. What is the estimated percentage of record categories that have been transferred according to the Retention Schedules for your areas of PM USA Records Management responsibility?

_____

9. What is the estimated percentage of record categories that have been disposed according to the Retention Schedules for your areas of PM USA Records Management responsibility?

_____

10. Are transfer and disposal notices issued to your areas of PM USA Records Management responsibility when the Retention Schedules indicate that these actions are required?

[] YES [] NO

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11. If the answer to question 10 is YES, what percent of transfer and disposal notices have been issued for your areas of PM USA Records Management responsibility?

_____

What percent of transfer and disposal notices issued for your areas of PM USA Records Management responsibility have been approved?

_____

12. Have Disposal Notices with reference to disposal suspension been signed by the department head, the records coordinator and the employee disposing of records to track and account for the disposal of records in your areas of Records Management responsibility?

[] YES [] NO [] NOT APPLICABLE (i.e., records are under disposal suspension)

13. In which of the following record storage and maintenance facilities does your department maintain records for PM USA departments?

[] Inactive Records Center

[] Departmental Central File

[] Tape Library/Host Computer

[] Other _____
(please specify)

[] None of the above

14. How many unique PM USA departmental Records Retention Schedules exist for the records maintained in the storage and maintenance facilities listed in question 13?

_____

15. Has your department begun reconciling the records in the storage facilities to the appropriate departmental Retention Schedule?

[] YES [] NO

16. If the answer to question 15 is YES, what estimated percent of departments with records maintained in the facilities have been reconciled to the appropriate departmental Retention Schedule?

_____

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